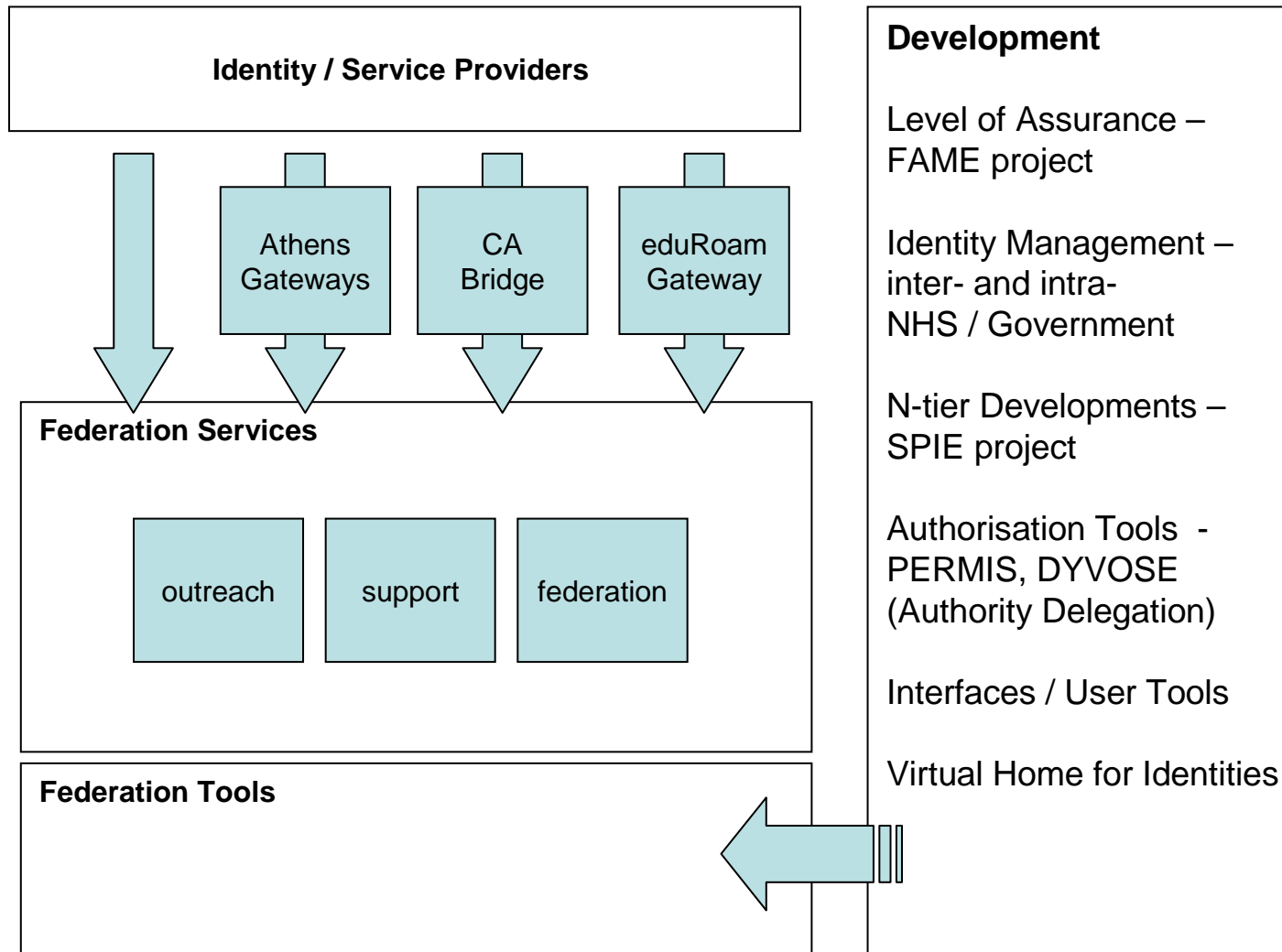


The UK Access Management Federation

Nicole Harris

Programme Manager

- The need to move from an existing legacy system: Athens.
 - The Federation Gateways designed by Eduserv.
 - Intensive outreach programme to support.
- The size:
 - 641 Higher and Further Education Institutions.
 - Joint initiative with schools through BECTA (British Educational Communications and Technology Agency). C.30,000 schools, but served through virtual regional identity providers.
- Prioritisation of join-up:
 - UK Certification Authority (National Grid Service).
 - Janet Roaming Service (eduRoam).
 - NHS.
 - Government initiatives (Unique Learner Number, Government portals, Government systems etc.)
- Complex federation service provider and development programme.



- The gateways act as 'outsourced' or 'virtual' Identity Providers for the federation:
 - Athens Federation Gateways;
 - Janet Roaming Service;
 - CA Bridge (temporary GRID credentials for federated users).
- Purpose is to leverage existing, rich back-ends and to allow choice.
- Athens Federation gateways seen as transitional tools.
- Janet Roaming Service and Certificate solutions may be longer lived.
- Technical specifications available from Programme Manager.

- 17 projects funded to support a range of development activities within core middleware.
- Range of technologies and issues explored:
 - Shibboleth and its application, including pilot federation (SDSS).
 - Radius, wireless networking and federated access: pilot 'virtual identity provider'.
 - Web portal and 'n-tier' issues for authorisation.
 - Attribute release policies, particularly with PERMIS tools.
 - Levels of authentication assurance.
 - Dynamic delegation of authority.
 - Integration of UK Certificate Authority and Shibboleth technology (new projects).
- Projects producing range of useful software tools and guidance for use now.
- Also informing future development plans.

- 'Spending Review' grant to achieve specific aim of 'working federated access management infrastructure' (Aim Two).
- £3.4 million across two years (although small carry forward of some funds).
- Focused activities:
 - 'Shibbolising' of JISC resources held at MIMAS and EDINA.
 - Funding for a support service – MATU at Eduserv.
 - Early Adopter funding to help institutions implement required technologies (two calls, 26 institutions).
 - Regional Early Adopters to explore e-Learning collaborations with federated access.
 - Funding for initial development of full federated service – UKERNA.
 - Communications and outreach programme.
 - Evaluation element.
 - Repository of outputs.
- Completes in April (July) 2006.
- Full federated access management system to be in place by November 2006.

- Moving from a 'working' infrastructure to a full production federation (i.e. with critical mass of users).
- Integration of current work plans within JISC Development and JISC Services.
- Main workpackages:
 - Continued support for current Athens contract (until July 2008).
 - Funding for the federation gateways.
 - Allowing Athens authenticated users to access shibboleth protected resources (Athens as super-Identity Provider).
 - Allowing institutionally authenticated (via shibboleth) users to access Athens protected resources (Athens as super-Resource Provider).
 - New contract for support service (January 2007).
 - Funding for JISC federation @ UKERNA.
 - Communications and outreach plan.
 - National and International liaison plan.

- **BECOME A FULL MEMBER OF THE FEDERATION USING COMMUNITY SUPPORTED TOOLS**

- COSTS: Institutional effort to implement software, join federation and enhance institutional directories
- BENEFITS: Full institutional control, skilled staff and access management solution for internal, external and collaborative resources

- **BECOME A FULL MEMBER OF THE FEDERATION USING TOOLS WITH PAID-FOR SUPPORT**

- COSTS: Cost of support from supplier and institutional effort in liaison with supplier and Federation
- BENEFITS: Full support in implementation and access management solution for internal, external and collaborative resources

- **SUBSCRIBE TO AN 'OUTSOURCED IDENTITY PROVIDER' TO WORK THROUGH THE FEDERATION ON YOUR BEHALF (SUCH AS USE OF CLASSIC ATHENS WITH THE GATEWAYS)**

- COSTS: Subscription costs to external supplier (from July 2008) and internal administration role
- BENEFITS: Minimum institutional effort to achieve access to external resources only



Why Has JISC Chosen this Route?

- Extensive research proved this to be the most appropriate technology. Meets the defined criteria for an access management system within the UK:
 - Internal (intra-institutional) applications (mostly through SSO system)
 - Management of access to third-party digital library-type resources (as now)
 - Inter-institutional use – stable, long-term resource sharing between defined groups (e.g. shared e-learning scenarios)
 - Inter-institutional use – ad hoc collaborations, potentially dynamic in nature (virtual organisations or VOs)
- International take-up secures future of development and support.
- International take-up provides economies of scale through work in partnership.

- Federated access management system key deliverable within the current JISC strategy.
- Implementation will require institutional effort, and should be recognised within institutional IT strategies.
- Federated access management is required to meet other strategic requirements:
 - DfES e-Strategy and e-Learning goals (such as e-Portfolios and e-Learning collaborations)
 - HEFCE e-Learning Strategies
 - Science and Innovation Investment Framework
- National take-up: interaction with BECTA and the schools sector, and increasingly with NHS.
- International take-up: importance of cross-working with Europe, US and Australia.

■ CHANGE

- JISC support for Athens will not be available after July 2008.

■ INSTITUTIONAL EFFORT

- To put in place the relevant parts of the system to allow devolved authentication.

■ CHOICE

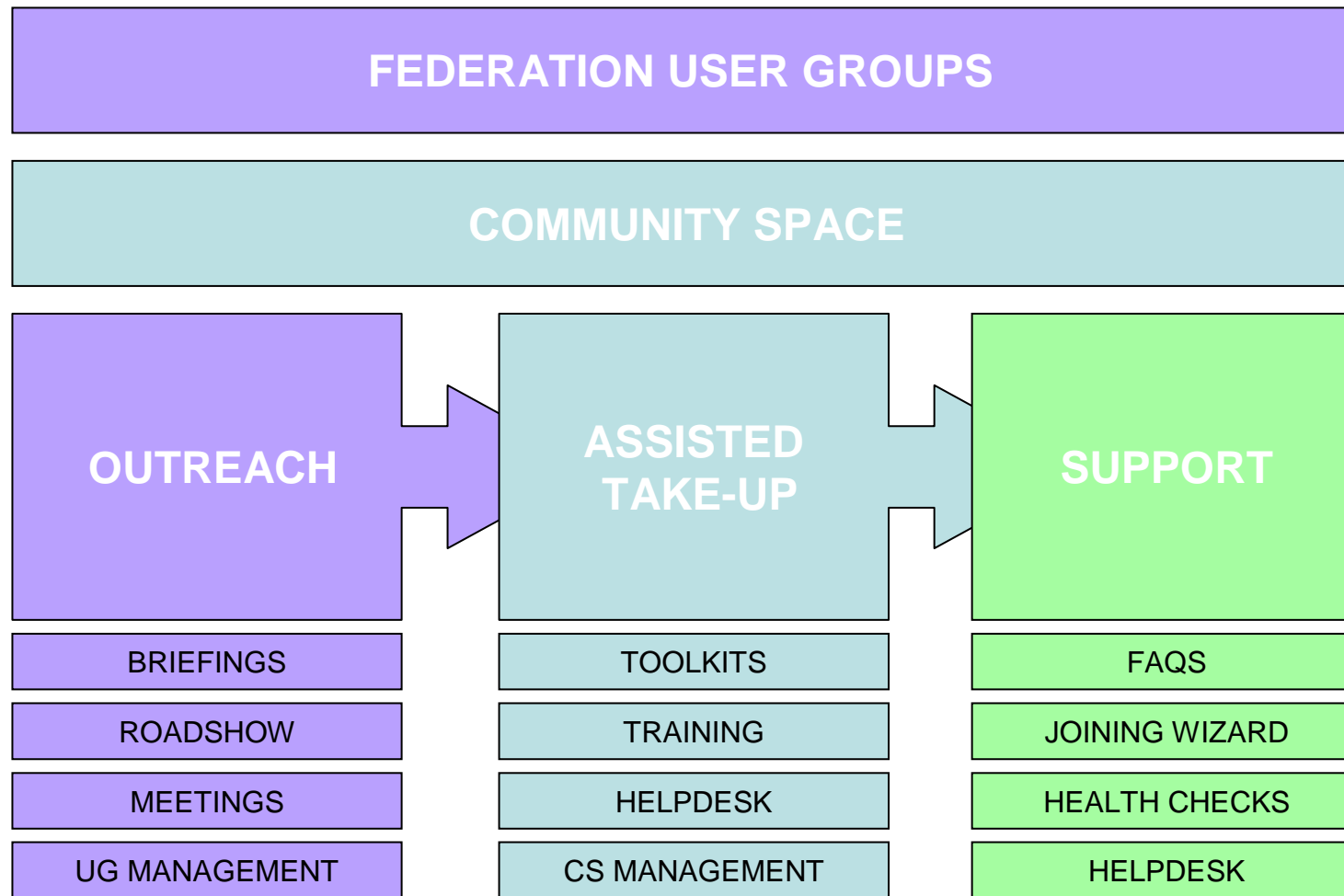
- Of technologies. The federated access management system will not dictate the choice of single sign-on, directory system or environment in which you work.

■ JOIN-UP

- Across domains (e-Learning, e-Research and Information Environments) and across systems (for internal, external and collaborative access management)

■ IMPROVEMENTS

- Real single sign-on, improved directory systems, foundation blocks for secure collaboration.



FUTURE: Ongoing JISC Development Plans

- Parallel to Transition Plan, a new development plan.
- Drivers: Science and Innovation Investment Framework (e-Infrastructure Working Group) and DfES e-Strategy.
- Still in planning:
- Funding from e-Infrastructure, e-Learning and Repositories programmes (cross-JISC).
- New development aims for Core Middleware:
 - **AIM ONE:** Developing Core Middleware in partnership.
 - **AIM TWO:** Enhancing AAI Services.
 - Virtual Home for Identities, Virtual Organisation support, eduRoam / Federation co-ordination, ShibGrid implementation.
 - **AIM THREE:** Understanding Infrastructural Requirements.
 - MIAP trials for e-Learning, joint support posts at UKERNA and CA (PKI brief, appropriate authentication etc.), accounting and auditing developments.
 - **AIM FOUR:** Changing practise.
 - Level of Assurance and Identity Management (recent call).
 - **AIM FIVE:** Meeting service to service requirements.
 - WS* and SAML compatibility, SAML 2.0 developments, access management and repositories.

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JISC Middleware programmes: http://www.jisc.ac.uk/programme_middleware.html

JISC Middleware documents: http://www.jisc.ac.uk/middleware_documents.html

Information about UK federation developments: <http://www.jisc.ac.uk/federation.html>